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ABSTRACT

This paper describes an experiment in using the "scenario," a concept parallel to that of the case study, as a research tool for obtaining information about possible sex discrimination in personnel decisions by high school principals in South Australia. A review of the literature indicated that in spite of legislation aimed at elimination of sex discrimination and the creation of agencies to enforce this legislation, sex role stereotyping in work roles for men and women was still commonplace. Accordingly, researchers used a survey-experiment research design to ascertain the existence, extent, and nature of sex discrimination in situations demanding personnel decisions. Respondents assumed the role of executive vice president in a hypothetical organization and were provided with 11 scenarios requiring managerial decisions involving selection, promotion, development, supervision, discipline, and various kinds of personal conflicts. Two versions of the questionnaire were prepared, with sex roles reversed for key figures in each scenario. Findings, displayed in tables, reveal that some scenarios present no difficulties regarding the principal's decision, whether the staff member is a male or female teacher. Although replies to Scenario 6 implied that decisions on personal problems are likely to indicate sex discrimination, and replies to Scenario 9 implied that a man's career was considered more important than that of a woman, findings did not support any general conclusion that school principals consistently differentiate between men and women in their personnel decisions. (TE)

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Scenarios as Research Tools for Investigating Social Issues

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SCENARIOS AS RESEARCH TOOLS FOR INVESTIGATING SOCIAL ISSUES

Marlene B. Small and Dora K. Briggs

A RESPONSE

Writing recently in *Studies in Education Administration* about the practice of educational administration in the South Pacific region, Udagama (1986:5) lamented the fact that research and academic writing on educational administration lacked critical analysis and were not related to social issues or action. In the same paper he commented favourably on the use of case studies in training courses and in-service programmes for practitioners in the South Pacific. This paper describes an experiment in using the 'scenario', a concept parallel to that of the case study, as a research tool for obtaining information about a particular social issue: that of possible sex discrimination in personnel decisions by school principals.

The investigation described was carried out in high schools in South Australia; it relates to a problematic area of administration frequently encountered in Australia and other metropolitan countries. This account is presented for readers' consideration, not because of the subject surveyed, but because the method used – or an applicable adaptation thereof – may offer possible guidelines to educational researchers in the South Pacific or any other region of the Commonwealth. They will undoubtedly have other, probably more pressing areas of educational administration which demand researched attention; it is hoped, therefore, that what follows may be of some use to those who sympathize with Dr Udagama's legitimate lament.

THE INVESTIGATION

A review of the literature indicated that in spite of the passing of legislation aimed at eliminating sex discrimination and the creation of agencies to support or enforce this legislation, the continuation of a pattern of work roles for men and women reflecting stereotypic attitudes common in society was still in evidence in many English-speaking countries. The review suggested, for the investigators, two basic implications:

a) the strength of sex-role stereotyping; and
b) the important part which the organisation played in perpetuating these stereotypes.

The issue of sexism in an educational context was first acknowledged in the South Australian Education Department in the early 1970s. Some developments undertaken by this Department were:

- the appointment of a Women's Adviser
- the establishment of a unit of advisory teachers to devise and implement non-sexist curricula
- the appointment of an Equal Opportunities Officer
- the appointment of a Co-ordinator of Affirmative Action
- programmes for women and girls
- the appointment of a Project Officer for girls' careers and subject choice.

(South Australian Education Department, 1981)

In a report on the teaching profession in South Australia written towards the end of that decade, Bradley (1978) claimed that the end of overt discrimination had brought no discernible change in

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the status of women within the profession and that it was 'clear that the South Australian Education Department must now explore the ways in which covert discrimination operates' (Bradley, 1978:36). There is reason to believe that large numbers of women are capable of leadership and that they want to assume it (Sampson, 1983), but there are still very disproportionate numbers of men to women in administrative positions in South Australian Education Department schools (Briggs and O'Brien, 1984). One reason for this is that, as employment opportunities for teachers have contracted in recent years, the profession is locked into the staffing structure of the previous decade which an equal opportunity policy can do little to change. Nevertheless, the researchers considered that the incidence of subtle forms of discrimination, possibly influenced by stereotypes, against women in schools should be investigated. Specifically, the aim of the researchers was to see whether high school principals, when faced with personnel policy decisions about members of their teaching staff, were likely to treat men and women differently.

Choice of research methods

The research question stated above immediately suggested to the researchers the use of observation techniques. Proponents of these techniques (e.g. Herbert and Attridge, 1975; Irwin and Bushnell, 1980; Richards, 1980) have claimed that they constitute one of the most useful techniques for gathering data, that they produce findings of greater generalisability than do many experimental laboratory studies, and that for professionals, they not only provide detailed information about behaviour but also assist in the effective understanding of that behaviour. The presence of an observer, however, is intrusive, and a long period of time may be necessary for adults to become accustomed to it. Even then, there is always the possibility that a subject's behaviour will be modified as a result of being observed. Furthermore, in conversations concerning the personal behaviour and private affairs of staff members an observer is likely to be unwelcome. The researchers therefore rejected this method of enquiry.

The possibility of administering a conventional questionnaire was then considered. Such a method of research was seen to be comparatively economical in terms of time and money, and would have been familiar, and not as threatening as observation, to the subjects of the study. The researchers feared, however, that if school principals were asked direct questions about their personnel policies towards male and female staff members respectively, there was the likelihood that inaccurate responses would be given, if not deliberately, then perhaps as a result of a subconscious fear of appearing to reject officially endorsed attitudes. The researchers also anticipated that high school principals, of whom there were only one hundred in South Australia, would have already been subjected to so many postal surveys of opinion that they would react adversely to another conventional one. A modification of this method of enquiry was therefore sought.

The method eventually selected, one which combined the survey approach with an experimental component, was derived from a study done by Rosen and Jerdee in the United States and reported in the *Harvard Business Review* of March-April, 1974.

The Rosen and Jerdee (1974) study used a survey-experiment research design to ascertain the existence, extent and nature of sex discrimination in certain situations demanding personnel decisions to be made by respondents. These respondents were asked to imagine that they were in the role of executive vice-president in a hypothetical organization, The Miller Clothing Company. The participants in the study were *Harvard Business Review* subscribers, who were sent a brief history of the Miller organization and were then presented with a questionnaire. This consisted of eleven incidents depicting employees of the company in situations involving selection, promotion, development, supervision,

discipline and various kinds of personal conflicts which were written in letter or memo form. The participants in the study were asked to respond to each incident by selecting possible managerial action in accordance with given alternatives for decision-making.

An experimental component was introduced into the study in the form of the two-part questionnaire. The variable of sex was inserted into the questionnaire by changing the sex of the key figure (employee) in each incident. The questionnaire was in two versions: half the respondents received a questionnaire with, for example, a female staff member as the key figure, while the other half of the respondents would have a male as the key figure in the same incident. The sex of the key figure was alternated in each incident.

The present study had the purpose of researching the incidence of sex discrimination in personnel decisions made by South Australian high school principals in particular situations which could be categorized as personal problems, infringement of regulations, career/promotion opportunities and personnel management. The participants invited to take part in the study were all high school principals in the employ of the South Australian Education Department.

The experimental feature of the original study was in the administration of the two-version questionnaire in which the sex of the key organization member in each situation was the only variable. This design was replicated in the present study.

For the current study eleven scenarios were constructed. Each represented a problem situation in which the respondent was asked to make a decision about a staff member.

The scenarios which made up the questionnaire were constructed by the following process:

i) transposing some problem situations used in the Rosen and Jerdee (1974) study into the high school framework
ii) discussion with colleagues at different levels of the school system
iii) a review of the relevant literature relating to the role of the principal and the responsibilities of staff members
iv) discussion of the incidents with the Director of Personnel in the South Australian Education Department
v) using the cumulative personal experience of the investigators
vi) piloting a first draft with selected deputy principals.

Two versions of the questionnaire, containing a series of eleven scenarios, were constructed. In each one a staff member was involved in a hypothetical problem situation requiring a decision to be made by the school principal. The scenarios were so constructed that the incidence of male/female staff member was not done on an alternating basis, as was the case in the Rosen and Jerdee (1974) study. The purpose of this modification was to prevent the intent of the questionnaire from becoming obvious to respondents. Half the high school principals, randomly selected, in South Australia were sent one version (A) of the questionnaire and the other half the alternative version(B). The questionnaires were accompanied by a letter explaining the purpose of the research in terms of personnel decision-making. The existence of two versions of the questionnaire was *not* mentioned.

The scenarios

The following is one version (A) of the scenarios as they appeared in the questionnaire. The other version (B) was identical, except that female staff members were replaced by male ones, and vice versa.

SCENARIO 1

John Roberts, a reliable Mathematics teacher on your staff, explains that he has a child at home with bronchitis. His wife is working in a store and cannot get time off. They have tried to make arrangements for their child's care but cannot do so for a week. In the meantime, John would like to arrive at 10 a.m. and depart at 2 p.m. each day for one week. He has five lessons that would have to be 'covered' within this time. It could be arranged but may cause inconvenience to others.

Would You

a) readily grant his request
b) inform him that he would have to lose pay if he only worked those hours
c) suggest that either he or his wife must decide to stay home for the week and face whatever financial loss may be incurred?

SCENARIO 2

Sandy Whitmore is an enthusiastic English/Drama teacher and she would like to attend a conference interstate which would mean three days' absence. Sandy has already been to two conferences this year and the school's policy is to limit each staff member's participation in conferences to two unless there are exceptional circumstances. Your deputy has expressed concern about the level of staff absenteeism for conferences. You know Sandy is a conscientious staff member but acknowledge your deputy's difficulties in finding relieving teachers.

Would You

a) grant permission for the attendance at the conference
b) call the teacher into the office and explain why you are reluctantly refusing the request
c) refuse the request without any explanation?

SCENARIO 3

Heather McDonald is a Geography senior on your staff. She has come to you because she is having difficulties in her professional relations with one of her faculty. From what you are told it seems to be a clash of personalities, but is obviously affecting the smooth running of the Geography department. You have noticed a certain suspicion or animosity at times on the part of the teachers towards senior staff and are keen to eradicate this syndrome.

Would You

a) tell her that you will meet her and the teacher concerned to try to sort out the difficulties
b) discuss with her ways to overcome the problem
c) tell Heather she will have to handle it herself, as she is expected to have that expertise and that it is her responsibility?

SCENARIO 4

Your French teacher, Doug Thompson, comes to see you about getting an extra day off before the holidays begin, because his wife has mistaken the dates for the holidays and has booked a flight a day before end of term. At this time of year it would be difficult to change to another flight, as Doug has already discovered.

Would You

a) grant his request
b) warn him that this is a serious matter but you will overlook it this time and cover for him
c) tell him he will have to put in a form for leave without pay and face the consequences?

SCENARIO 5

You are concerned because it has come to your notice that your young Science senior, Bob Fuller, is involved with the wife of a prominant doctor in the neighbourhood. You are worried about the effect on the staff and particularly the reputation of the school. The school is in a largely middle class district and the School Council is always concerned that the school reflects the values of the community.

Would You

a) recommend that Bob ask for a transfer
b) talk to him about the anxieties you feel
c) ignore the situation?

SCENARIO 6

The Economics teacher, Betty Harper, is a bright young woman with four years' teaching experience. Her husband holds a good position as reporter with a T.V. station. He is to take a six week trip overseas to make a documentary for his station. Betty speaks to you to seek your co-operation in her appeal for leave without pay to accompany her husband.

Would You

a) encourage Betty and say that you will strongly recommend that she be granted the leave
b) tell her that such requests make school management very difficult as you may not easily get a suitable replacement, but you will help where you can
c) tell Betty that you will not recommend her leave?

SCENARIO 7

You have noticed that Marty Williams, your Technical Studies teacher, is having discipline problems with his classes. He is a jovial fellow but his attitude towards students (regarding discipline) is far from what you consider necessary for the smooth running of the school.

Would You

a) immediately confront Marty with the issue and take steps to remedy the problem
b) speak to the Technical Studies senior about the situation and leave it to him to resolve

c) take no action, trusting to time and experience to improve the situation?

SCENARIO 8

One of your Art teachers, Anne Westwood, who is newly appointed and with only two years' teaching experience, has been far too familiar with students and this has been causing friction with other staff members. They consider it undermines their efforts to establish and maintain more traditional staff-student relationships.

Would You

a) reprimand Anne in harsh terms, telling her you expect this to stop immediately
b) tell Anne that her behaviour is disturbing to you and to other staff and that you would like her to alter her pattern of relations with students
c) take no action on the principle that the teacher will learn with experience?

SCENARIO 9

A valued staff member, Kerry Jones, wishes to transfer to another school because she will not be able to teach Japanese at your school, as it is being phased out and Kerry does not want to teach other subjects.

Would You

a) try to retain Japanese in the school to solve the transfer problem
b) ask Kerry if she won't reconsider teaching in other subject areas
c) take no action and let her go ahead with the transfer?

SCENARIO 10

Peter Buller is an outgoing young Music teacher on your staff. It has been reported to you by a deputy that he is frequently late in the mornings, in particular on Mondays. Your deputy expresses concern that this is a bad example to others.

Would You

a) tell Peter that he will have to curb his social life if it interferes with his work commitments
b) speak to him about his responsibilities and hope that he takes the hint
c) ignore his lateness, since he is a competent teacher who takes several extra curricular activities?

SCENARIO 11

You have a deputy going on long service leave for eight weeks. Bruce Pike, the History/Social Sciences senior, is on the eligibility list for deputy principal and has already had acting deputy experience. He has worked on several committees and on the school council. You have one other staff member also eligible, the P.E. senior, Jane Richards, who has shown outstanding organizing ability in matters associated with her teaching area but whose personal commitments have meant more limited time for other school involvement.

Would You

a) select Bruce as acting deputy because he has devoted much time to extra duties
b) select Jane because you know she has the organizational skills and this would give her greater experience
c) believe both equally eligible and therefore 'toss the coin'?

THE FINDINGS

A total of 69 usable responses to the questionnaire was received by the researchers. The following Table gives the scores for each suggested decision shown as percentages of the total responses received.

If the most popular choice of decision for each scenario is considered, then in only two of the scenarios (6 and 9) is there seen to be a difference between responses to version A and version B of the questionnaire. The choice made most frequently for all scenarios was for the b) decision, which tended to be a compromise one, or one in which a decision made in the interests of the school was 'softened' a little for the staff member.

The Table shows that some scenarios seemed to present no difficulties regarding the decision to be taken by the principal, whether the staff member was a male or a female teacher. In other cases, although the most popular choice for a decision was the same, whether the teacher concerned was male or female, there was considerable support for different decisions according to whether a male or a female was involved. Although replies to Scenario 6 suggested that problems of a more personal nature were more likely to indicate sex-descrimination, and replies to Scenario 9 implied that a man's career was more important than that of a woman, the findings from this study did not, in general, lead to the conclusion that the school principals involved differentiated between men and women in their personnel decisions.

(Table – Please see next page.)

TABLE 1: *Table of Responses Shown as Percentages of Total*

Scenario	Decision	Version A	Version B
1	a	63.6	61.1
	b	6.1	8.3
	c	15.2	19.4
	missing	15.2	11.1
2	a	6.1	13.9
	b	90.9	83.3
	c	0	0
	missing	3.0	2.8
3	a	36.4	27.8
	b	60.6	66.7
	c	0	0
	missing	3.0	5.6
4	a	15.2	5.6
	b	15.2	19.4
	c	60.6	75.0
	missing	9.1	5.6
5	a	0	0
	b	63.6	72.2
	c	36.4	27.3
	missing	0	2.8
6	a	36.4	52.8
	b	54.5	41.7
	c	6.1	11.1
	missing	3.0	0
7	a	12.1	33.3
	b	84.8	61.1
	c	0	0
	missing	3.0	5.6
8	a	0	0
	b	93.9	94.4
	c	3.0	5.6
	missing	3.0	0
9	a	9.1	0
	b	60.6	47.2
	c	27.3	47.2
	missing	3.0	5.6
10	a	18.2	16.7
	b	78.8	75.0
	c	0	2.8
	missing	3.0	5.6
11	a	42.4	36.1
	b	18.2	33.3
	c	9.1	8.3
	missing	30.3	22.2

COMMENTS ON THE RESEARCH TECHNIQUE

Considering that the school principals involved in the study had been subjected several times in recent years to surveys of opinion, the researchers felt that their response rate of 69 per cent was pleasing, and attributed it partly to the intrinsic interest of the scenarios. Some respondents stated that they had enjoyed participating in the exercise.

It is this 'intrinsic interest' component which would, we believe, make this method of investigation a valuable tool for Commonwealth researchers. Many educational administrators will have no doubt experienced the disappointment of enthusiastically sending out questionnaires to their 'field' staff, in the hope of gaining an insight into their problems and thus having material on which to base possible solutions; only to have their hopes dashed by a lack of response.

This is understandable; if head-teachers or district staff in metropolitan countries – with all their educational and training advantages – often fail to respond through lack of interest or confidence, how much more likely it is that in many Commonwealth countries, with staff frequently hard-pressed by the extent of their duties, many of those questioned will fail to respond.

Equally, if the Australian head teachers concerned found that this scenario form of presentation caught their attention (a 69% response seemed to indicate this), it would be hoped that in countries where the 'story' or oral tradition still flourishes, such an approach would also have enough attention-catching appeal to elicit fuller and more honest responses than the eternal questionnaire.

The scenarios were described as briefly as possible so as to avoid producing a long questionnaire which might deter respondents, but some school principals complained that they were given insufficient details on which to base a decision. Again for the sake of brevity, only three choices of decisions were offered, and some respondents expressed frustration at this, while others commented that the choices presented were too extreme. Other comments referred to the need to take into account such factors as school policy and climate, well established decision-making structures, the management style of the principal, and Education Departmental policy and regulations. The researchers concluded that some of these criticisms might have been avoided if fewer but fuller scenarios had been supplied. With hindsight, it was realised also that valuable insights might have been gained if respondents had been invited to give reasons for their decisions.

Since we now have the benefit of hindsight, we would offer the following suggestions for modifying the question format:

- there could be a 'compromise' option in every selection but it need not always be listed in the 'b' or middle position;
- an opportunity to explain why a particular decision was taken could be given to any participant wishing to do so; and
- an appropriate space could be provided, at the end of each list of possible decisions, for a participant to propose a totally different solution from those suggested.

We think that the extra scope provided by these amendments would greatly add to insights into Commonwealth educators' problem-solving instincts and techniques.

Although respondents were given no indication that the questionnaire was designed to investigate sex-discrimination, it cannot be assumed that the decisions indicated by respondents were, in fact, consistent with those which would have been made by them in real situations. As with conventional surveys of opinion, this questionnaire may have elicited ideal rather than likely decisions, or even those judged by respondents to be consistent with the stated policy of the Education Department. Nevertheless, the researchers considered that there was somewhat less likelihood of this occurring

with the scenario technique than with straightforward questions and would hope that the same would apply in other Commonwealth countries.

Udagama (1986:1) expressed an emerging view that research in his region should be useful to the governments and people, and that it should be conducted by the Pacific Islanders themselves. Some caution may well be appropriate, however, in encouraging practitioners to undertake research using techniques in which they have not been thoroughly trained. Observation techniques require skill in, for example, the construction of an appropriate instrument, while the wording of a conventional questionnaire contains many pitfalls. It may be that practitioners could more safely devise scenarios and related questions, based on their own experience and understanding of people in their region, which they could interpret in the light of their local knowledge. As the writers have indicated, this research technique is by no means without weaknesses, but it is suggested as one method of investigating some issues of social importance, about which educational administrators need to be informed.

A COMMONWEALTH PERSPECTIVE – a note from the editor.

In the light of the above remarks and, I trust, the relevance of this account of a 'scenario' approach to educational administration research, two fairly typical Commonwealth problems are listed below with a hypothetic 'sample' scenario for each.

The 'scenario' method adopted by Dr Briggs and Ms Small will, I am sure, open up fresh possibilities to Commonwealth researchers who are anxious to base their work on their fellow educators' on-the-spot experience. Many educational administrators in Commonwealth countries have considerable reservoirs of field experience on which they could draw, in collaboration with colleagues, in designing appropriate 'scenario' material.

I hope that Dr Briggs' account and these examples will provide stimulation and practical guidance.

PROBLEM ONE

Many Commonwealth countries have very scattered areas of population. Educators out in the field often feel isolated and even neglected by those in 'comfortable' positions at headquarters. Centrally based administrators, on the other hand, have the very real difficulty of spreading their time and attention fairly and effectively between the demands of desk-based administrative duties and the needs of the *people* who have to administer in far-flung districts.

SCENARIO ONE

Jo Falata, head of a remote island upper primary school, has written for the third time to you, the Principal Education Officer, Primary, complaining that the children in his school have no books to read other than the few text books – many of them past their best – he found in the school when he took over last year. He adds that he knows that there are many, many boxes of suitable books 'sitting' unattended in headquarters – he has seen them! He then appeals to you to get the books out to schools like his as quickly as possible.

Would You

a) pass on Jo Falata's letter to one of the EO's working in your office and tell him/her to deal with it

b) reply to the letter to the effect that HQ is grossly understaffed and pressed and that the matter will be dealt with in due course

c) investigate the whereabouts of the boxes of books yourself and then reply to Jo Falata reassuring him that some books will be on their way to his school soon
d) decide that the situation Jo Falata describes is so serious that you need to plan a personal visit to a few such remote schools and reply to his letter to this effect?

Should You

a) apologise to Jo Falata for the lack of previous replies or action
b) disclaim any knowledge of his previous correspondence
c) follow up personally on such a routine matter *or* delegate
d) reprimand your HQ staff for *their* neglect?

Optional Comments

1. Reasons for the decisions taken:

2. A different solution or further considerations:

PROBLEM TWO

Well qualified, trained and dedicated personnel are thin on the ground in many Commonwealth countries, where education and the educators to provide and monitor it are at a premium. To compound this problem, most other fields of professional activity in such countries are also short of 'well educated' personnel and sometimes can and do entice enterprising educators away from teaching.

SCENARIO TWO

Mary Sumarish, aged 22, has been to the University of the East Malados where she gained an excellent B.A. in English, History and Politics and a Post-Graduate Teaching Certificate. Since her return she has been teaching in an out-of-town, but not remote secondary school for eighteen months and has already been noticed as extremely dedicated, enterprising and competent.

She suddenly receives a letter from the Ministry telling her that as from the beginning of next term she will take over as head of another out-of-town lower secondary school with 200 children and a staff of eight.

Mary knows that only a few of the staff in that school are trained; most will be older than she is and no-one else has a degree. She, however, has less than two years' experience and is most reluctant to take on the responsibility. Besides, she wants to devote some of her time to external studies to improve her own qualifications. She comes to you for advice.

Would you advise her to

a) be firm and send back a letter of refusal to the Ministry
b) ask for an interview with the Ministry official concerned so that she can put her case
c) look outside the teaching profession where she could easily get a job which would enable her to work in town and have plenty of time to study
d) 'have a go' – accept the promotion on the assumption that she will be able to cope and can't possibly do worse than the previous head?

Should Mary

a) refuse such early promotion for the sake of her professional integrity
b) accept the responsibility for the sake of the children she serves

c) look elsewhere?

Optional Comments

1. Reasons for the advice given:

2. Other possible advice or considerations:

* * * * * * * * * * *

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